

Financial and Performance Progress Reports Reference Guide for Grantees





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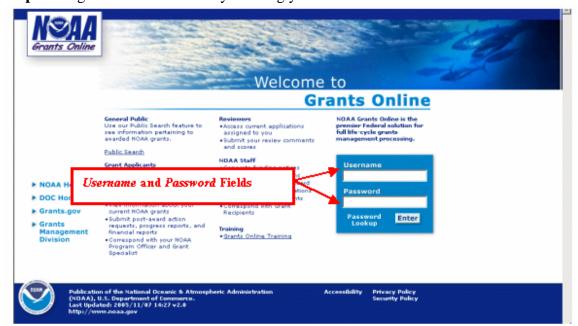
The purpose of this document is to provide Grantees with a step-by-step process for completing and accessing Performance Progress Reports and Federal Financial Reports in Grants Online.

Performance Progress Reports Overview

There are two versions of the Performance Progress Report: Simple and Expanded. The Expanded Performance Progress Report is based on a prototype Performance Progress Report under development by a Federal Review Board. It should not be used unless an agreement is in place with the Program Officer to use this report. Nearly all Recipients will use the Simple version of the Performance Progress Report.

The Simple Performance Progress Report is an electronic means to enter some basic reporting information and attach the Performance Progress Report that Recipients are currently submitting by paper or email. The advantage to submitting this report through Grants Online is that the report will initiate workflow actions for submission by the Recipient Authorized Representative and acceptance by the Federal Program Officer, with optional routing to other internal NOAA personnel for review. Additionally, the Grants Online data repository is becoming the Official Award File for all Award documents. By submitting the report through Grants Online, the Recipient is guaranteed that they are credited the report submission without waiting or depending on others to enter the information.

Completing the Performance Progress Report – Simple Version



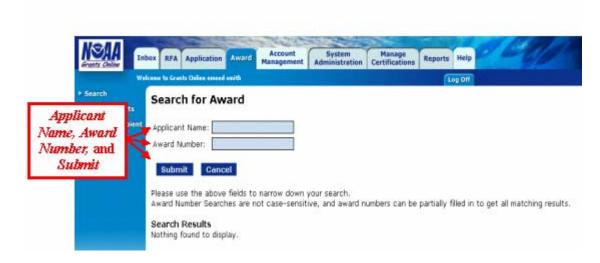
Step 1: Log into Grants Online by entering your Username and Password.



Step 2: Select the *Award* tab and click on the *Search Award* link to complete the Performance Progress Report. The *Search Financial and Project Progress Reports* link retrieves previously filed reports (see page 17 of this guide for more detail).

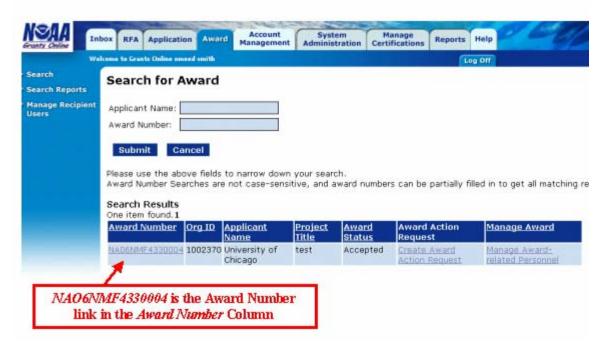


Step 3: After selecting the *Search Award* link click *Submit*. This will return all Awards for which you are designated as a Principal Investigator. If you are an Authorized Representative or Business/Financial Representative, all Awards for your organization will be returned. Alternatively, you may narrow the search by entering the *Award Number* before clicking *Submit*.





Step 4: The following screen displays the search results. To select the Award, click on the actual Award number link in the *Award Number* column.



Step 5: Once you have selected an Award, the following *Grants File* screen is displayed.





Step 6: Scroll down to the bottom of the *Grants File* screen to view the *Associated Documents* section and view the Performance Progress Reports. It is possible that the report you wish to create was pre-generated in anticipation of you finishing and submitting the report. If the status says "*In Progress*," then the report is ready for you to complete and submit. Click on the ID link for the report.

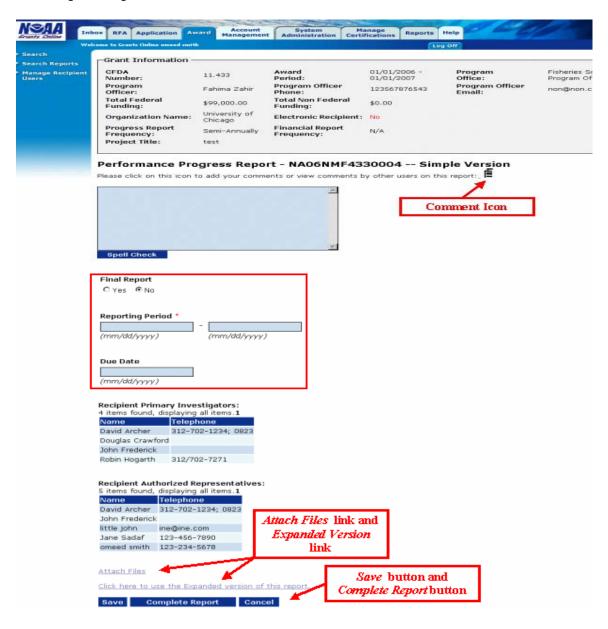


Step 7: The Performance Progress Report Screen is displayed. Select the link entitled, *Go to Performance Progress Report Details Page*. If a Performance Progress record is not available for completion and submission, contact the Grants Online Help Desk to have the necessary report record added to the system. The Grants Online Help Desk may be contacted via email at GrantsOnline.HelpDesk@noaa.gov or by phone at 301.713.1000 or toll free at 1.877.662.2478, 9 am – 5 pm eastern time. Once the Help Desk lets you know that the report record is ready, repeat steps 1-6



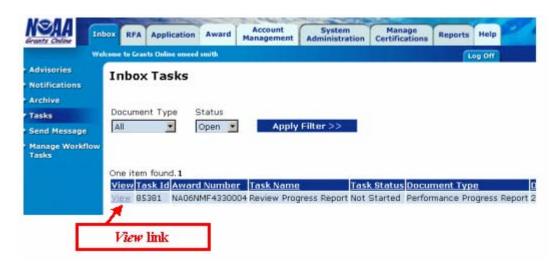


Step 8: The *Performance Progress Report - Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users. Complete the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. The large text box that is visible as part of the Simple Report screen may be used to provide an overview or introduction to your report, including an explanation of the attached files. Alternatively, if you have a simple or short report, it may be entirely entered in this text box. Attach files by selecting the *Attach Files* link. Once all the information has been entered, click the *Save* button followed by the *Complete Report* button.





Step 9: Once you have completed the report and selected the *Complete Report* button from the *Performance Progress Report* screen, you will receive a task to Review the Performance Progress Report. Navigate to the *Inbox* tab, select *Tasks* from the menu on the left, and select the *View* link on the Performance Progress Report task.

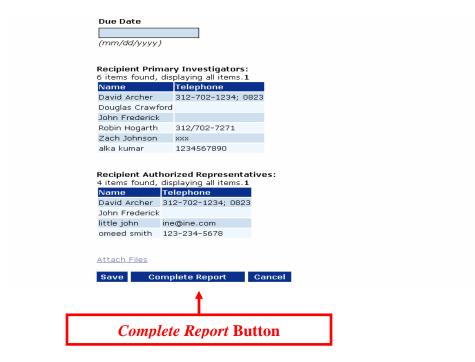


Step 10: The Performance Progress Report task launch page is displayed. From the action drop down menu select *View Progress Report* and select the *Submit* button.

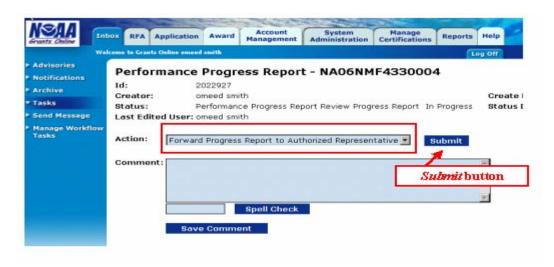




Step 11: After reviewing and editing the Performance Progress Report, select the *Complete Report* button.



Step 12: Upon clicking the *Complete Report* button, the task launch page is displayed. From the action drop down menu, select *Forward Progress Report to Authorized Representative* and click on the *Submit* button. A task will be sent to the Recipient Authorized Representative to Review the Performance Progress Report. The Recipient Authorized Representative will have the option to view the Progress Report, return the Progress Report to the creator for revisions, or forward the Progress Report to NOAA.





Completing the Federal Financial Report – Simple Version

Federal Financial Report Overview

Because of the anticipated changes to the Federal Financial Report process, Grantees are currently encouraged to submit their SF-269 and SF-270 reports to NOAA outside of the Grants Online System as they have done in the past. Alternatively, electronic copies of the SF-269 and SF-272 reports can be submitted via Grants Online using the procedure outlined in this section of the Reference Guide.

There are two versions of the Federal Financial Report in Grants Online: Simple and Expanded. The Expanded version of the Federal Financial report is based on the new Federal Financial Report under review by the President's Office of Management and Budget. The new report combines information from the SF-269 and SF-272 reports that are currently required for submission. Like the Performance Progress Report, you should not use the Expanded version of the Federal Financial Report until directed to do so with a Special Award Condition.

Step 1: Log into Grants Online by entering your Username and Password.

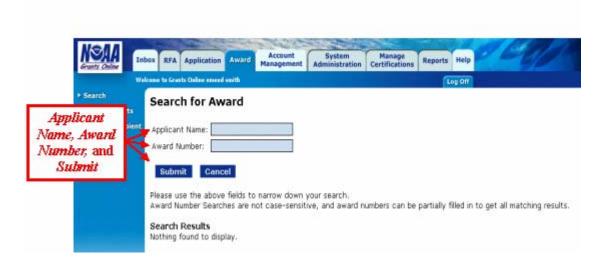




Step 2: Select the *Award* tab and click on the *Search Award* link to complete the Financial Report. The *Search Financial and Project Progress Reports* link retrieves previously filed reports (see page 17 of this guide for more detail).

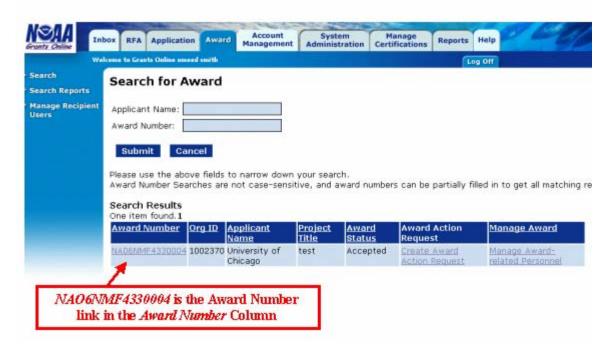


Step 3: After selecting the *Search Award* link, click *Submit*. This will return all Awards for your organization if you are an Authorized Representative or Business/Financial Representative. Alternatively, you may narrow the search by entering the Award Number before clicking *Submit*.





Step 4: The following screen displays the search results. To select the Award, click on the actual Award number link in the *Award Number* column.

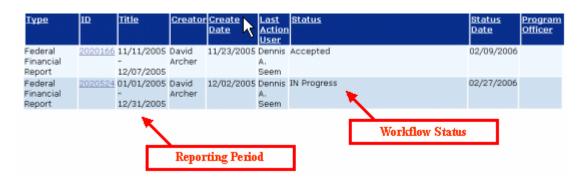


Step 5: Once you have selected an Award, the *Grants File* screen is displayed.





Step 6: Scroll down to the bottom of the *Grants File* screen to view the *Associated Documents* section and view the Federal Financial Reports. It is possible that the report you wish to create was pre-generated in anticipation of you finishing and submitting the report. If the status says "In Progress," then the report is ready for you to complete and submit. Click on the ID link for the report.



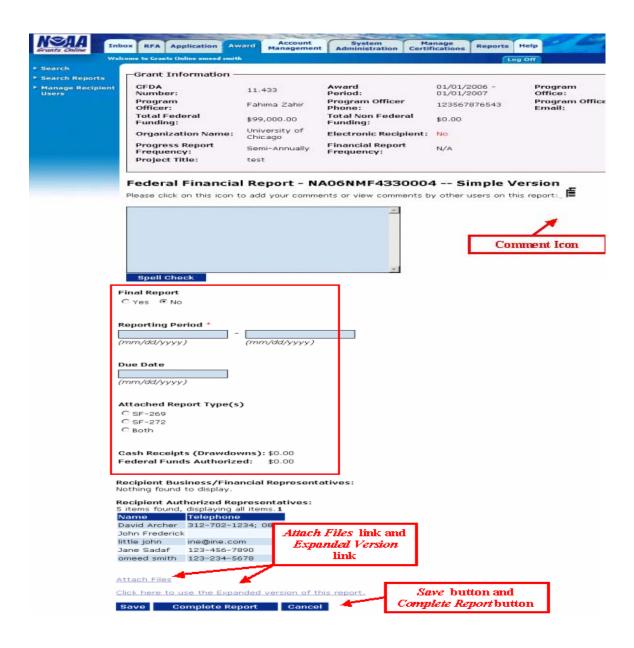
Step 7: Select the link entitled, Go to Federal Financial Report Details Page.

If a Federal Financial record is not available for completion and submission, contact the Grants Online Help Desk to have the necessary report record added to the system. The Grants Online Help Desk may be contacted via email at GrantsOnline.HelpDesk@noaa.gov or by phone at 301.713.1000 or toll free at 1.877.662.2478, 9 am – 5 pm eastern time. Once the Help Desk lets you know that the report record is ready, repeat steps 1-6.



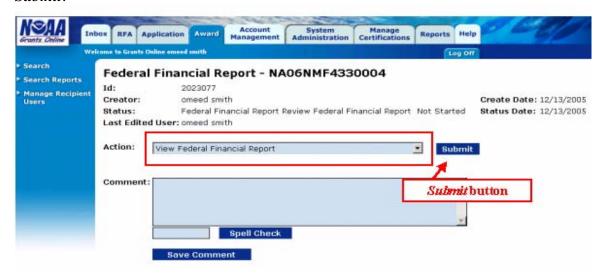


Step 8: The *Federal Financial Report - Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users. Complete the detailed Federal Financial Report information, including designation of Final Report, Reporting Period, and Due Date. Attach the Federal Financial report form(s) (SF-269/272) by selecting the *Attach Files* link. The attached SF-269/272 forms do not need to be signed and scanned. The certification and submission of the report through Grants Online serves as an electronic signature. Once all the information has been entered, click the *Save* button followed by the *Complete Report* button.





Step 9: Upon selecting the *Complete Report* button, the task launch page is displayed. From the action drop down menu select *View Federal Financial Report* and select *Submit*.



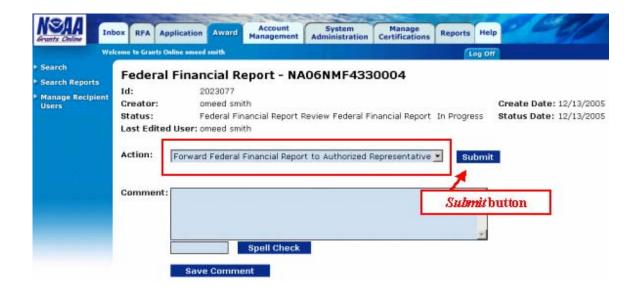
Step 10: After you have reviewed and edited the Federal Financial Report, select the *Save* and *Complete Report* buttons.





Step 11: Upon selecting the *Complete Report* button, the task launch page is displayed. From the action drop down menu select *Forward Federal Financial Report to Authorized Representative* and select *Submit*.

A task to Review the Federal Financial Report will be sent to the Recipient Authorized Representative. From the action drop down menu, the Recipient Authorized Representative will have the option to view the Federal Financial Report, return the Federal Financial Report for revisions, or forward the Federal Financial Report to the agency.



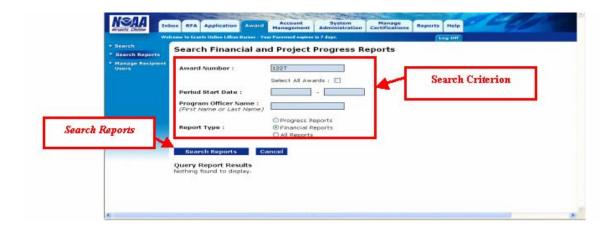


Accessing Existing Reports

Step 1: In order to search Financial and Performance Progress Reports, select the *Search Financial and Project Progress Reports* link from the *Award* tab.



Step 2: The screen below is displayed. Enter at least one search criterion, including *Award Number, Period Start Date, Program Officer Name* and *Report Type*. After entering the search criteria, click the *Search Reports* button.

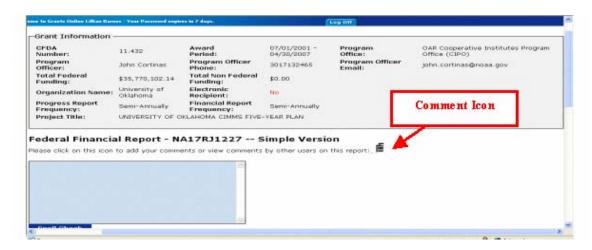




Step 3: The search results display all report types including the Performance Progress Reports and Federal Financial Reports. To view a specific report, select the link for the report you would like to view from the *Report* column. This section will detail Federal Financial Report information. (If you were to select the link for a Progress Report, you would have access to view the Progress Report information as detailed in pages 3-9 of this document.) Migrated reports will display "Undefined" under the Program Officer column.



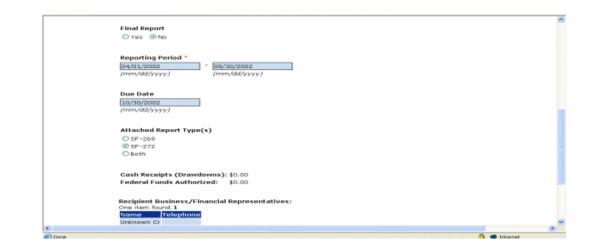
Step 4: The *Federal Financial Report - Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users and recipients.





Step 5: The *Federal Financial Report - Simple Version* screen displays the Federal Financial Report details including whether the report is the *Final Report*, the *Reporting Period* and the *Due Date*. The *Attached Report* radio buttons indicate the types of reports: SF-269, SF-272, or both.

Please note that migrated Awards will not have reports attached; as such, the *Attached Report* field will indicate which type of report was migrated.



Step 6: At the bottom of the *Federal Financial Report - Simple Version* screen, you can click the link entitled, *Attach Files* to view any attached files. You may also select the *Cancel* button to return to the Federal Financial Report launch page.

